DOCUMENT RESUME

ED 456 395 CG 031 199

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TITLE Retaining Knowledge Workers: Connecting Individual Well-Being and Organizational Performance.
PUB DATE 2001-10-00
NOTE 9p.; In: "Focus on the Future: Achieving Balance in Career & Life Integration. International Career Development Conference 2000"; see CG 031 198.
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PUB TYPE Reports - Descriptive (141) -- Speeches/Meeting Papers (150)
EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Congruence (Psychology); *Employees; Job Satisfaction; *Measures (Individuals); *Organizational Effectiveness; *Well Being

ABSTRACT

Knowledge workers are the critical mass of people throughout an organization who hold the mental models of how and why things are done as they are as well as how and why to change them. Given that the retention of these workers is a key concern to organizations in every industry, what can be done about worker retention? This paper presents a diagnostic instrument, the Salient Beliefs Review: Individual Well-Being and Organizational Performance Indicators (SBR). The SBR is used to assess the potential for worker satisfaction with an organization. The theoretical background of this instrument develops the concept that the greater the congruence between the outstanding beliefs of the individual and the policies and practices of the organization, the more likely that the individual and the organization will thrive. The SBR was developed to assess the degree of congruence among individuals' beliefs; their own behaviors; their perceptions of the organization's policies; and their perceptions of the organization's practices on seven dimensions. The results of an administration of the SBR to a group of administrators in a suburban school district are discussed. Suggestions for further use of the instrument are also included. (MKA)

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Retaining Knowledge Workers: Connecting Individual Well-Being and Organizational Performance

by

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CG031199

International Career Development Conference 2000

ERIC/CASS PUBLICATION

Retaining Knowledge Workers: Connecting Individual Well-Being and Organizational Performance

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Every company has a core of workers essential to the maintenance and growth of the organization. These workers are the bearers of the organization's knowledge. It is important that the concept of knowledge workers be defined broadly. Knowledge workers are not simply the engineers, inventors, and early adopters identified primarily with the high-tech industry. Knowledge workers are the critical mass of people throughout the organization who hold the mental models of how and why things are done as they are as well as how and why to change them. Individual mental models are developed through experience and organizational mental models are developed through shared experience. It is only through explicit sharing of the mental models that continuity can be achieved where continuity is desired and where change can be brought about when change is appropriate. "The parts of an organization's memory that are relevant for organizational learning are those that constitute active memory—those that define what an organization pays attention to, how it chooses to act, and what it chooses to remember from its experience—that is individual and shared mental models" (Kim, 1993). Companies with high turnover rates often lack sufficient knowledge workers to achieve the rate of learning needed in today's competitive market.

Given, then, that retention of workers is a key concern to organizations in every industry what can we do about worker retention? This paper (and the workshop on which it is based) presents a diagnostic instrument, the *Salient Beliefs Review: Individual Well-Being and Organizational Performance Indicators (SBR)*© (Bloch, 1999) used to assess the potential for worker satisfaction with an organization. Readers of this paper will gain an understanding of the same content as that presented in the workshop but where this paper contains a description of the *SBR*, participants in the workshop were able to complete the questionnaire and discuss their responses and any questions it raised. The three sections to this paper parallel the agenda of the workshop:

- Theoretical Background of the *SBR:* The Motivation to Work;
- Assessing Congruence: A Description of the *SBR*; and
- Increasing Congruence: Utilizing the *SBR* and *SoulWork* in Your Setting.

Theoretical Background of the *SBR*: The Motivation to Work

The theoretical background of the *SBR* develops the concept that the greater the congruence between the outstanding beliefs of the individual and the policies and practices of the organization the more likely it is that the individual and the organization will thrive. This concept rests on two sources. The first is the theory of motivation developed from empirical evidence by Herzberg, Mausner and Snyderman (1959). The second is the theory of seven

connectors between spirituality and work developed by Bloch and Richmond (1998). This second theory is pertinent to the apparently growing need for individuals to experience a sense of this connection in their workplaces.

The relationship between individual satisfaction and organizational factors has been laid out clearly in the identification of work factors "that meet the needs of the individual for avoiding unpleasant situations" and other factors "that reward the needs of the individual to reach his aspirations" (Herzberg, Mausner & Snyderman, 1959, p.114). The first set of factors, those that meet the needs of individuals to avoid unpleasant situations, Herzberg *et al* called "hygienes" because like hygiene in the medical sense it is its absence that causes dissatisfaction. Included in the hygienes are such elements as supervision, physical working conditions and company policies and administration. Thus company policy that is seen as adverse to individual needs and desires can be a deterrent to retention. The *SBR* deals directly with company policy and the administration of such policy in two sections of the instrument. The second set of factors are those that can motivate you to do more. These included recognition, achievement, and the possibility of growth. The *SBR* incorporates elements of such satisfaction in the content of the items. These concepts of Herzberg's two-factor theory of motivation form the basis for the assertion that individual well-being and organizational performance are inextricably linked.

Current research seems to have demonstrated a spiritual component to the link between individual well-being and organizational performance. Mitroff and Denton (1999) found that employees who work for organizations they consider to be spiritual are less fearful, less likely to compromise their values and more able to throw themselves into their jobs. A *Business Week* article reported on research in Australia which demonstrated that when companies engage in programs that include spirituality, productivity increases and turnover is greatly reduced (Conlin, 1999). In *SoulWork: Finding the Work You Love, Loving the Work, You Have*, Bloch and Richmond (1998) presented seven dimensions that can serve as connectors between spirituality and work for the individual. In their simplest form, they are as follows:

- *Change*: Being open to change in yourself and the world around you
- *Balance*: Achieving balance among the activities of your life such as work, leisure, learning, and family relationships
- *Energy*: Feeling that you always have enough energy to do what you want to do
- *Community*: Working as a member of a team or community of workers
- *Calling*: Believing that you are called to the work you do by your particular mix of talents, interests, and values
- *Harmony*: Working in a setting that harmonizes with your talents, interests, and values
- *Unity*: Believing that the work you do has a purpose beyond earning money and in some way serves others.

These seven connectors form the content base of the *SBR*.

Assessing Congruence: Description of the *SBR*

The *SBR* was developed to assess the degree of congruence (or, on the other hand, disconnect) among individuals' beliefs, their own behaviors, their perceptions of the organization's policies, and their perceptions of the organization's practices on each of the seven dimensions above. In a 28-item Likert-scale questionnaire format, the SBR asks individuals to examine how important the seven dimensions are in their own beliefs and how they are represented in their own behavior as well as in organizational policies and practices.

The instrument thus has four sections representing the four levels of assessment: "Beliefs," "Behaviors," "Policies," and "Practices." Each section includes seven Likert-type response items, corresponding to the seven dimensions. There is also a section to record background information in which respondents report their sex, age, number of years in the organization, and number of years in their current position by checking the appropriate categorical response for each item. Additional demographic questions may be added by organizations using the SBR.

The first section, "Beliefs," asks individuals: "How important is each of the following to you personally?" Each item represents one of the seven dimensions identified above and each dimension is written as a phrase, in contrast to a single word. For example, the instrument does not use the word *change* as its first item, but the phrase "Being open to change in yourself and the world around you." *Response choices range from 5=of great importance* to *1=of no importance*.

The second section, "Behaviors," asks: "How well do you think you do each of the following as compared to other working adults?" As in the previous section, a sentence is used to represent each dimension. The first sentence, for example, is "I respond to the need for change." Response choices range from *5=very well* to *1=not at all well*.

The third and fourth sections mirror the first two. The third, "Policies," asks the respondents to assess: "How important is each of the following as stated in your organization's policy?" And the fourth, "Practices" asks: "Based on your knowledge, how well does your organization carry out the following activities?" The same Likert-type scales are used as in the first two sections and again phrases are given for each dimension.

Scoring of the instrument includes computing means and standard deviations for each of the 28 items and then comparing each dimension on the four levels of assessment. So, for example, the means for responses to the question on the dimension of change are examined for differences among "Beliefs," "Behaviors," "Policies," and "Practices."

Increasing Congruence: Utilizing the *SBR* and *SoulWork* in Your Setting

A Sample Case

Utilization of the *SBR* and the underlying material from *SoulWork* can be illustrated by examining the results of one of the administrations of the *SBR*, to a group of administrators in a suburban school district. A report, sent to the district superintendent, reviewed the structure and purpose of the instrument and then presented findings and recommendations. It included a graph that provided an easy way to visualize the relationships among the seven dimensions and the four levels of assessment. (See Figure 1.)

Here is a summary of the major findings and the recommendations they suggested:

- The belief identified as most important was *unity* with *change*, *balance*, and *harmony* close behind. (It is expected that the scores on the beliefs section will be generally high. The seven connectors were already identified as salient or outstanding beliefs.)
- The greatest difference between belief and self-described behavior was in *balance*, indicating that individuals are not satisfied with their own lives in this regard. This is an area in which the school district might want to provide personal development opportunities.
- The greatest similarity between beliefs and behaviors was on the dimension of *community*. This suggests that the managers work well in teams and this is important to them.

- *Calling*, *harmony* and *unity* were also closely aligned, suggesting that managers see their work as having importance beyond the "bottom line" and they are able to carry this out well in their own behaviors.
- The greatest gap between policies and practices was on the dimension of *balance*, implying that the respondents perceived that the district overstated their support of the need for employees to lead balanced lives. The district might want to consider how to bring practices more in alignment with policies.
- On the dimension of *harmony*, the district's practice very slightly exceeded stated policy. This finding may indicate that while the district acts in a way that utilizes the talents and values of its employees, it is not fully aware of how well it is doing in this regard. The district may want to consider the implications of the difference for recruitment of future employees who can assess stated policies but not experience the benefits of practice until after they are hired and accept employment. In this tight employment market, the district may want to be more explicit about its policies in regard to utilizing the talents of its leaders so that it can capitalize on this organizational asset.
- The greatest similarity in the mean scores of beliefs and practices is on the dimension of *harmony*. The administrators expressed satisfaction with the way the organization enables them to work in settings that utilize their talents, interests, and values. This is important to them and it is supported through their own efforts and through organization practices.
- The greatest difference between employee preferences and their view of the district's practice is on the dimension of *balance*, with *energy* as a close second, suggesting that administrators did not find their beliefs in the importance of balanced lives supported by the district's practices. Given the gaps on *balance* identified above between individual beliefs and behaviors and between perceptions of district policies and practices this may be the most fruitful area for action to bring about greater career happiness and improved performance by the administrators in the district.

General Suggestions for Further Use

Examination of grouped data can help to show a company or division of a company the degree of congruence or incongruence between the relative importance employees give to their beliefs and the employees' views of company policy and practice. In addition, by adding items to the demographic section of the questionnaire, an organization can assess differences in congruence between groups within it. In other words, demographic questions can be used to disaggregate the data to look at congruence within divisions or units or across job titles. For example, the levels of congruence experienced by all workers in the production, distribution, and sales divisions may be compared, or the congruence experienced by all managers as compared to administrative staff may be examined.

Interventions based on the results can then be structured by career practitioners working within the organization or acting as consultants to it. Companies, or other organizations, may want to implement individual or group training around areas in which individuals find gaps between their personal beliefs and their own behaviors. How, for example, does one bring one's own life into better balance or tap into all sources of energy to increase productivity on the job? The answers to these questions are complex and are dealt with in *SoulWork, Finding the Work You Love, Loving the Work You Have* (Bloch & Richmond, 1998) as well as many other works. Companies that find a high degree of incongruence between perceived policies and practices may want interventions to bring those closer together. In some circumstances, companies may

believe that their policies are more consistent with employee belief preferences than found in the survey. This finding suggests the need for greater communication within the organization.

Finally, the *SBR* has been also used by career professionals working with individuals to assess their employment experiences and how this relates to their current career decision making. This individual use can be implemented in organizational career centers or be used as a tool in assisting personnel with within-company career changes or in outplacement situations.

In any case, the *SBR* is designed to spark exploration and discussion. Its purpose is to increase the sense of well-being that we, as individuals, can experience in our work so that we too can feel in our work what the poet Donald Hall (1993) has expressed about his: "In the best part of the best day, *absorbedness* occupies me from footsole to skulltop."

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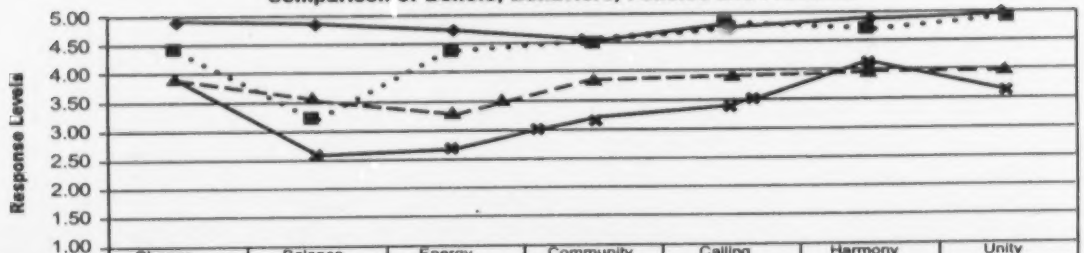
Figure 1

Salient Beliefs Review

Individual Well-Being and Organizational Performance Indicators,

Sample organization One

Comparison of Beliefs, Behaviors, Policies and Practices



	Change	Balance	Energy	Community	Calling	Harmony	Unity
Personal Preferences	4.90	4.86	4.76	4.52	4.76	4.86	4.95
Personal Behavior	4.38	3.19	4.38	4.52	4.81	4.71	4.90
Organizational Policies	3.90	3.52	3.29	3.86	3.90	3.95	3.95
Organizational Practices	3.90	2.57	2.67	3.19	3.38	4.10	3.62

Items